

**REGISTER OF WILLS
CLERK OF ORPHANS' COURT DIVISION
COURT OF COMMON PLEAS OF YORK COUNTY
YORK COUNTY JUDICIAL CENTER**

BRYAN K. TATE
Register of Wills
Clerk of Orphans' Court

JOHN C. HERROLD
Solicitor



ARA KIMBERLY McPHERSON
Chief Deputy
Register of Wills

BECKY K. FOUST
Chief Deputy
Clerk of Orphans' Court Division

January 31, 2020

TO: Honorable Julie Wheeler, President Commissioner
Honorable Doug Hoke, Vice-President Commissioner
Honorable Ron Smith, Commissioner
Mark Derr, Chief Clerk

FROM: Bryan K. Tate, Register of Wills & Clerk of Orphans' Court

Bryan K. Tate

RE: York County Register of Wills & Clerk of Orphans' Court 2019 Annual Report

The Register's/Clerk's office financials for 2019 reflect a year of collections for the York County General Fund and the Commonwealth of Pennsylvania with increases in some areas and decreases in others. With the additional challenges placed on the office by the PA Supreme Court and the Administration Office of PA Courts (AOPC) Guardianship Tracking System (GTS) and the Public Access Policy of the Unified Judicial System, the staff continued to operate all the new requirements with fidelity.

The department continued its outstanding professional working relationships with Orphans' Court Judges Vedder and Renn, Family and Juvenile Administrative Judge Marceca-Strong and Dependency Judges Platts, Prendergast, and C. Menges.

Acting as Agent for the Commonwealth of PA, Department of Revenue, Inheritance Tax Division, the Register collected \$27,840,546.11 in Inheritance Tax payments, a \$1,625,534.42 increase over 2018 receipts. Over the past 20 years, York County Estates remitted PA Inheritance Tax totaling \$427,731,546.11. As Agent for the Department of Revenue, Inheritance Tax Division, the Commonwealth reimbursed the county through the Register's Office \$149,635.37, an increase of \$6,231.08 over 2018 commission. Inheritance Tax commission is calculated by the PA Department of Revenue on IH Tax collected by the Register: first \$200,000 – 4.25%, next \$800,000 – 1.75%, and all commissions in excess of \$1 million – 0.5%.

The office departmental budget for 2019 was \$503,957.00. As of this writing, the department expenditures for 2019 totaled \$499,210.96. For the past 20 years, the department has been \$219,034.08 under budget.

Total fees collected in 2019 by the department and remitted to the York County General Fund totaled \$1,088,435.33, an increase of \$6,136.15 over 2018. This total represents fees for filing documents, IH Tax commission, Act 34, Act 24 and automation fees.

Estate case files opened in 2019 totaled 2,207, a decrease in estates from 2018 by 132. 2,335 marriage licenses were issued in 2019, a decrease in marriage licenses from 2018 by 149. Decreed adoptions increased in 2019 to 212 from 159 in 2018.

The Commonwealth of PA received their portion of the fees collected by the Register/Clerk's office totaling \$124,463.25, a decrease of \$7,340.75 from 2018 as a result of the decreases in 2019 estate case files and marriage licenses.

Imaged documents for 2019 totaled 307,446 pages, representing years 1991-1994 and 6,569 cases (nearly double 2018's imaged pages due to Juvenile Dependency Case records downloaded into Orphans' Court Case record).

In 2019, Register/Clerk Jacobs performed his duties in a judicial capacity as a Quasi-Judicial Officer holding Will Hearings.

The webpages for the Register and Clerk are continually updated with the current information from the PA Supreme Court and the Administration Office of PA Courts (AOPC) so users have the latest guidance for processing filings in the offices.

The 2000–2019 department annual report of accomplishments is attached for your perusal. It is important to highlight the history of twenty-year Register/Clerk Bradley C. Jacobs and his legacy of public service to our community. Brad retires with a formidable record of service to the residents of York County having overseen the probate of 39,402 estates, the issuing of 46,614 marriage licenses, and the oversight of 3,014 decreed adoption cases. Additionally over his twenty-year tenure, Brad returned nearly \$220,000 to the York County General Fund, operating a fiscally conservative office in support of the taxpayers of our community.

Special appreciation is given to the hardworking team in the Register/Clerk's Office:

Chief Deputy Clerk of Orphans' Court Becky Foust
Chief Deputy Register of Wills Kim McPherson

Register of Wills Clerks:
Kris Stambaugh
Danika Sellers

Solicitor John C. Herrold

Orphans Court Clerks:
Kathy Guth
Melanie Robinson
Barb Conaway
Britney Axe

Enclosure

cc: President Judge Joseph C. Adams
Judge Richard K. Renn
Judge Andrea Marceca Strong
Judge Todd R. Platts
Judge N. Christopher Menges
Judge Kathleen J. Prendergast
Judge Clyde W. Vedder
Paul Crouse, Court Administrator
Mark Walters, Communications Director